

SB03 Implementation Process

CCHE Allocation Principles

1. Intended to be a temporary allocation model
2. Need to take into consideration institutional ability to benefit from flexibility options
3. Allocation should preserve “status quo”
4. Should use a system (state) wide approach to allocation
5. Take into consideration enrollment increases that have occurred and impending leveling off
6. Take into consideration unique offerings/ and role and mission specific activities when developing allocation principles
7. Should take into consideration priorities from strategic planning priorities

Key components of Institution Flexibility Plans

1. Calendar/ definition of terms/instructions (DHE)
2. Policy/statute justification for flexibility plans (DHE)
3. Assumptions/metrics to be used (accepted by CFO/CCHE/DHE/CAO/CEO)
 - a. Protection of low/middle income students
 - b. Underrepresented students
 - c. Other data points TBA
4. Stated tuition increases/justification [including history and peer comparison] (institution)
5. Financial modeling based on allocation formulas (institution)
6. Governing board voting/ constituent feedback processes (institution)
7. Operational flexibility request- efficiencies/savings created/quality assurance or impact (institution)
8. Financial aid packaging policies/timeframe
9. Review tracking form (DHE)
10. Include constituent feedback process AND regional issues that may be present.